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Military Market

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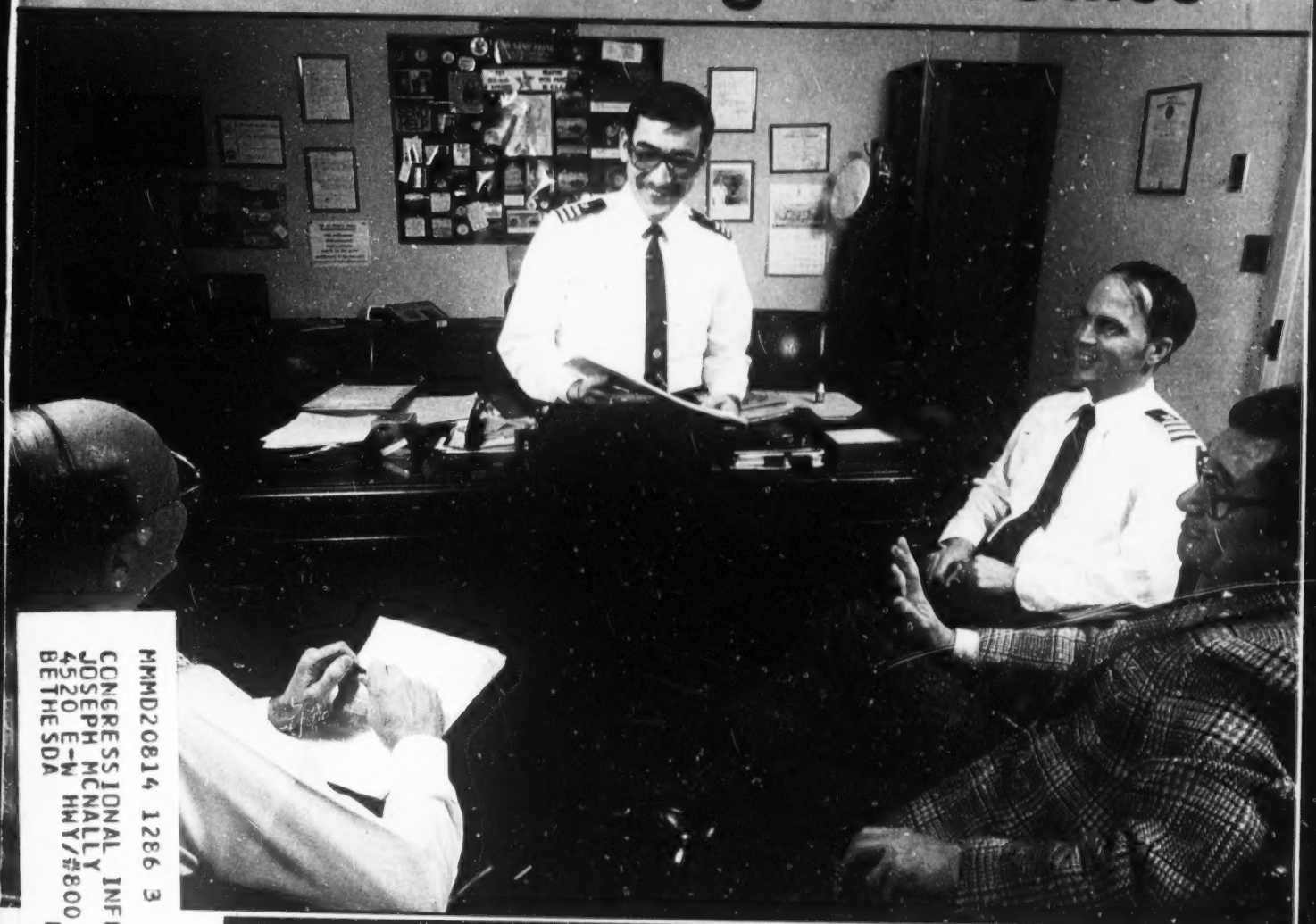
Creative Forum for Navy Resale:

The Project Management Office



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TEAM DYNAMICS

In San Antonio: ALA & AFCOMS Updates

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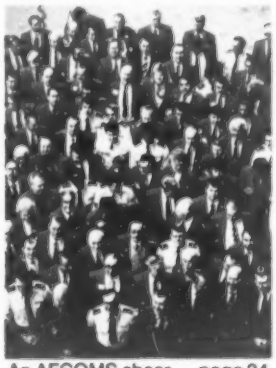

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COVER DESIGN BY MARISOL QUINTANA

COVER PHOTO BY KATE PATTERSON

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serving the military resale system

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news

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AAFES creates marketing, purchasing spots; cuts merchandising, services divisions

PHOTO BY TRACY WOODWARD

SIDE-BY-SIDE AT AN ALA CONVENTION: Maj. Gen. John E. Long, AAFES commander; O. John Nille, AAFES deputy commander for operations; Ronald T. Wulff, marketing director; and Frank Hardt, purchasing director.

Officials at the Army and Air Force Exchange Service want to cut the fat out of their organization.

They hope that under a new "realignment," employees will spend less time on administrative tasks and more time working to increase sales.

Here are some of the changes they will make:

☐ *Eliminate the merchandising division and the services division. In their place, establish purchasing and marketing "directorates."*

The new directorates are headed by the former directors of the merchandising and services divisions. Frank Hardt heads the purchasing directorate and Ronald T. Wulff heads the marketing directorate.

☐ *Change the name of the top civilian post and have four directorates — which make up the new "sales group" — report directly to the person who holds that job.*

O. John Nille, newly designated as deputy commander for operations, will have responsibility for the purchasing, marketing, distribution and purchasing policy directorates, as well as for the AAFES distribution region.

☐ *Reorganize the area exchanges.*

The realignment officially began Jan. 25. Officials ex-

Please see STREAMLINING on page 14.

Commissaries cope with Gramm-Rudman

Budget cuts threatened under the Gramm-Rudman-Hollings law haven't completely killed everybody's sense of humor.

"It's no longer a Pentagon. It's a triangle . . ." joked Maj. Gen. M. Gary Alkire recently. "That's all we can afford."

The services have told their commissary systems that budget cuts are coming, but at MILITARY MARKET press time, not all of the commissary agencies knew exactly how bad they would be hit starting March 1. Nevertheless, travel and hiring freezes and reductions in store hours have been planned for all the systems.

One Department of Defense official told MILITARY MARKET that, because commissaries are a personnel item and therefore "an important commodity, they were given priority."

Nevertheless, everyone is going to have to learn to deal with Gramm-Rudman-Hollings, Air Force Lt. Gen. Edgar A. Chavarrie, deputy assistance secretary of defense for military manpower and force management, told American Logistics Association members and their military guests in February.

Speaking at a dinner during ALA's Commissary Roundtable, Chavarrie said he was optimistic that, even though the commissary system would "take some hits," the coming reductions would probably not be as unreasonable as some people think.

"The bottom line is we must deal with it. When Gramm-Rudman is

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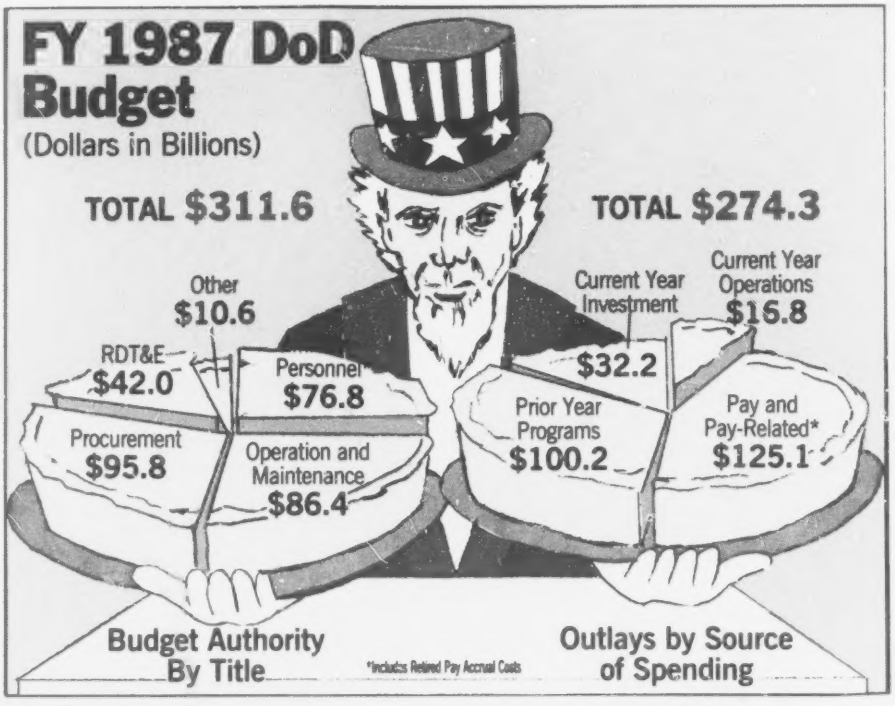

CHART BY MIRIAM MacPHERSON

Commissaries seek flexibility in Gramm-Rudman

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triggered, all is equal and nothing is precounted," said Chavarrie. He added that it would be in everyone's favor to work on the provision "prior to its happening."

Maj. Gen. Alkire, the commander of AFCOMS, and other commissary officials have stressed that, despite Gramm-Rudman budget cuts, patron service will remain a high priority. But how patrons will be served is still up in the air, since not all of the commissary agencies have completed their budget plans.

And each agency is taking a different approach to the budget cuts:

☐ **AFCOMS:** AFCOMS' Maj. Gen. Alkire told attendees at the recent ALA conference that he is "ignoring predictions of specific impacts, and instead plans to "program AFCOMS to be as flexible as possible" in its budget-cutting.

"We are going to have to do some very serious studies of our whole system" to figure out how to save money, Alkire added. The "key to survival starting in fiscal year 1987," he said, "will be the flexibility developed in the next seven months."

AFCOMS has developed a "shopping list" of 19 contingency alternatives that can be put into effect, depending on how deep the budget cuts fall, added Col. Frank Dooley, the agency's new operations director.

Gramm-Rudman-Hollings "will mean a major impact on the operations and maintenence appropriations" of the systems, said Dooley. He assured the industry that AFCOMS would not cut any product line without first talking with manufacturers or reps.

AFCOMS is faced with a $5 million cut in the remainder of its fiscal 1986 budget, and has therefore imposed freezes on headquarters hiring and temporary duty funds.

It had appeared that AFCOMS would have to reduce store operating hours by as much as 10 percent to 15 percent. But a careful reading of the law and support from the Air Staff has given the agency some relief. The regions have been given the option of opening stores one half hour later than normal on days of operation.

Industry reports indicate that some stores and regions have already begun to reduce store hours.

As a general rule, said an AFCOMS official, ConUS stores will remain closed on all U.S. holidays. Overseas stores will remain closed in observance of local holidays.

Another effort to reduce manpower costs will be checking store inventories to determine "slow-moving" items that can possibly be discontinued to save on labor costs. The official said that each region would work with area vendors to define slow-moving items.

Item records will be consolidated within each region and will not be dictated by headquarters. In some regions, as many as 40,000 different items are being stocked. These records are being consolidated so that "we need less manpower to run the system," Alkire said. Consolidations mean more shelf space for best-sellers and sales therefore go up, he added.

AFCOMS is also having its regions look into using frequent delivery programs in stores where it is feasible, said the official. Frequent delivery will aid in ensuring a 99 percent item stockage rate. Three ConUS AFCOMS stores already use frequent delivery.

Not-in-stock signs will also be discontinued. Shelves will be left open until orders are filled, an AFCOMS spokesman said.

The official said AFCOMS would also begin moving away from filling special order requests, though patrons will still be allowed to order special meat cuts and purchase products by the case lot.

The use of carcass beef in Air Force commissaries will stop soon, and all stores will convert to using 100 percent boxed beef.

Despite the cuts, Maj. Gen. Alkire told a commissary officers meeting in San Antonio that, "in a tight funding environment, training will al-

Please see COPING on page 16.

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ways be fully funded."

☐ **Troop Support Agency:** "We want to leave customer service alone," one TSA region offical who wanted to remain anonymous told MILITARY MARKET.

TSA hasn't released any offical statements about budget cuts. However, some officials expect that the agency's budget will be cut by some $12 million.

"We are setting priorities," said the TSA region official about plans to deal with the cuts. "We plan to cut anything that is not essential."

The official also said he anticipated that the region's two or three annual meetings of commissary officers would likely be cut back to a single annual meeting.

☐ **Marine Corps:** The Marine Corps hasn't been affected by a budget cut, but has still imposed its own internal hiring freeze, according to Joe Jeu, Marine Corps commissary program director.

"We are fortunate to be spared from any cuts," Jeu told MILITARY MARKET.

He said the Marines probably didn't receive budget cuts because the system had already weathered a 23 percent increase in its work load over the last two years without any additional funding.

☐ **NAVRESSO:** The main problem facing Navy commissaries, said Nick Giannone, deputy commander of the commissary operations group, is "people to run the stores."

Giannone told the ALA audience that "we have to face reduced dollars for payroll." Since the Navy is already tight on store personnel, "I don't know where there will be much more savings in payroll cuts" for Navy commissaries.

Navy commissaries average 44 hours of operation a week, the lowest of all the commissary systems.

Meanwhile, a NAVRESSO spokeswoman estimated that the agency's budget would be cut about $250,000

☐ **Defense Personnel Support Center:** A spokeswoman for DPSC said that the agency is being faced with a $2 million budget cut. DPSC has imposed hiring, overtime and TDY freezes in an effort to meet the cuts.

The spokeswoman said the agency did not anticipate the cuts would reduce service to commissaries overseas. "Right now, the only questionable area is the [clothing] factory," she said.

STREAMLINING, continued from page 14.

phone calls to get it accomplished. "Under the old way of doing it, I would have to call three or four people to get that accomplished. I would have had to burden my chief of staff," he said.

Now, the commander can get the deputy commander for operations to handle the task, thereby freeing him for other duties.

Changes at the Area Exchanges

Also under the realignment, area exchange managers will be relieved of some administrative duties so they can spend more time out in the exchanges.

The area exchange manager "is the key manager of the whole nine yards . . . He is the key person in the organization. He is the most experienced merchant that we have," Long said during the interview.

It's important that area exchange managers be in the stores, "guiding, coaching, planning, developing, helping" the store managers, he said.

As part of the reorganization, officials have shifted office functions, retaining the manager and three assistants at the area level. Other functions — such as personnel — have been moved to other levels.

Before the realignment, the regions did some of the same tasks that the area exchanges were doing, AAFES officials said. "So we streamlined the reporting system and had all reports go directly either from the exchange to the region, or from the exchange — by computer — directly to the headquarters," John Nille, AAFES deputy commander for operations told MILITARY MARKET during an interview.

With the shakeup, some area exchange employees may lose their jobs, but officials say they hope to place them in other jobs in the organization. "We have made a committment to the people at the area level that we will find them a job within the organization. With our turnover, we've always got openings," Nille said. He added that some people may have to relocate.

Other changes under the realignment are:

☐ *Upgrading of the training department.*

"In the training area, we took a very detailed look at how our training has been handled in the past," Nille said. "We're going to concentrate on creating managers more than creating people who understand every single procedure we have. And we have a load of them, as every government agency does," he said.

☐ *Formation of a more individual-oriented personnel department.*

The name of the personnel department has been changed to human resources directorate to reflect an increased emphasis on the individual instead of on the organization.

The organization and staffing branch from the plans and management division will join with the personnel department to form the new directorate. Officials estimate that this move should take about six months.

☐ *Shift of the quality assurance function to the purchasing directorate.*

The quality assurance division will now be right with the buyers. "We hope that that natural antagonism that exists — the buyer wanting to get merchandise on the shelf and the quality assurance man wanting to make sure there are no loose threads on the garments at all, that everything's perfect — should help us to buy better merchandise," Nille said.

☐ *Formation of the sales associate concept.*

Employees working on the sales floor at the store level are now called sales associates. "I feel that people who are the heart and soul of AAFES are those employees out there on the sales floor meeting with the customers. What we did was we changed their name to reflect exactly what they should be doing," Long said.

The sales associate not only should sell, but should also communicate with management about "what we should be doing" to increase sales, he said.

☐ *The video production section has also undergone a change. It has been moved from the training section of the personnel division to the administrative division to make it more accessible by all branches of the organization.*

☐ *The employee relocation section will now be located under the administrative division.*

Throughout the realignment, there have been changes in the use of the term "division." Support and selling elements, the core functions of the business — formerly called divisions — are now called "directorates," such as the purchasing directorate and the marketing directorate.

Other support elements — such as public affairs, plans, and safety and security — are still referred to as divisions. They make up AAFES' "special staff."

Laundry Detergents Lead the Way

Whether liquid or dry, household cleaning products are in a growing market, thanks to emphasis on product extensions, convenience, and promotion.

By ANNE ROKETENETZ
Associate Editor

LAST YEAR'S INTRODUCTION of Liquid Tide by Procter & Gamble hit the soap industry with such impact that P&G's competitors are still scrambling for ways to cash in on a newly active market.

According to reports for 1985, laundry detergents — especially liquids — were the most active and competitive of all household items during the first half of the year.

But despite Liquid Tide's immediate success, it has yet to beat out the No. 1 market shareholder: Wisk, the Lever Company's liquid laundry detergent, remains in the first place position. While Liquid Tide has captured about 6.8 percent of the market, Wisk is clinging tightly to an 8.8 percent share.

To make sure that first place spot holds, Lever has introduced a dry formula of Wisk, touting it as the detergent that, for 25 years, "nothing has beaten" when it comes to "ring around the collar."

Lever is also introducing liquid and dry forms of detergent under the new Surf brand to capitalize on as much of the market as possible.

Meanwhile, laundry detergent being marketed under the company's Sunlight brand name is reported to be doing very well in Canada. That brand is an extension of the company's brand of dishwashing liquid.

Another firm vying for a spot on the laundryroom shelf is Colgate-Palmolive, with its introduction of a liquid version of its Fab brand laundry soap. Reportedly, the company is spending an estimated $25 million on introducing the new product.

Household Cleaners Climb

Charles H. Kline & Co., a New Jersey-based research firm, found in a recent study that sales of household cleaning agents have been on the rise for the past several years.

The Kline company found that in 1984, Americans spent $8.9 billion on household cleaning items, up 7.1 percent from 1983.

The company predicts that sales will continue climbing in the future and estimates an annual growth rate of 7.5 percent between now and 1989, when it expects sales to climb to $12.9 billion. (A Kline spokeswoman notes that this includes an inflation rate of 5.5 percent.)

The study attributes a moderate but steady increase during the past several years to many successful, innovative line extensions introduced to the market, plus a heavy focus on promotion by their manufacturers.

One trend that is strong in this category of the household supplies market is the heavy emphasis now being put on convenience and quick results. The Kline study attributes this emphasis to changing demographics, including more single people and more working woman who have less time and are willing to spend less time cleaning.

The study also notes that the increasing number of senior citizens who are physically less able and just less interested in cleaning have also contributed to this trend.

According to the Kline study, an estimated 20 companies market more than 5,000 brands of household cleaners. But three companies account for 44 percent of the total market.

The study lists P&G as leading the pack with a 29 percent share of the total market volume. *(EDITOR'S NOTE: Please see chart.)* Lever and Colgate-Palmolive follow respectively as the No. 2 and No. 3 market share holders.

The report breaks the household cleaner market into 39 categories that make up six groups. The six are: soaps and detergents, laundry additives, specialty cleaners, pest control products, deodorizers and disinfectants, and polishes and waxes.

The Kline study predicts that, if the growth of the household cleaners market continues in the same way as it is now, the strongest overall growth will come in the categories of vinyl protectants, carpet deodorizers, air fresheners and bathroom cleaners.

One trend in this market has been for manufacturers to place a big emphasis on product promotion. A good example is P&G: The company that

The Top 10 Domestic Household Cleansing Products Companies

(Percentages of Total for 1984)

Company	% of Total
Procter & Gamble	29
Lever	8
Colgate-Palmolive	8
Clorox	5
S.C. Johnson	5
Sterling Drug	4
Purex	4
American Home Products	3
Amway	3
Morton Thiokol (Texize)	3
All others	28

Courtesy of Charles H. Kline & Co.

celebrated its 60th birthday last year by giving out 500 diamonds and 2.4 million cubic zirconia inside boxes of its Spic & Span product will reportedly repeat the promotion sometime this year.

Advertising Age recently reported that the company has been calling the "gem" promotion one of the most successful in the company's history. Sources indicate P&G might be adding other gems besides diamonds and zirconia to this year's giveaway.

Bleached Out . . .

Sales of non-chlorine dry bleach have soared, says Robert Boylon, military sales manager for the Gold Seal Co., about that company's 30-year-old Snowy brand of dry bleach.

"Our sales have increased significantly," he recently told MILITARY MARKET, despite the fact that liquid chlorine bleach still ranks No. 1 for market shares in the bleach category.

Boylon attributes the increase in popularity of both dry and liquid non-chlorine bleaches to the fact that more and more of today's clothes are manufactured from manmade fibers that could be damaged by chlorine bleach. Consumers are reaching for chlorine bleaches for use in household cleaning rather than for laundry.

Leading in the non-chlorine bleach market is Clorox II. Overall, its manufacturer, the Clorox Co., leads the bleach market with a 57.2 of the market volume.

The liquid trend that has hit the laundry detergent category has also hit the bleach segment. Dow Chemical Co. has introduced Vivid, a liquid non-chlorine bleach safe for all fabrics.

Other Trends

☐ **Hand Soap:** One area of the household supplies market that is not expanding is liquid hand soaps. These are failing because consumers "are not using them up fast enough," says one market observer. People are reaching more for the refills than they are for the actual products, he says. Therefore, the market has leveled off, and the category is not attracting new customers.

But still, Dotolo Citrus Research Corp. has gone ahead and introduced Dotolo's Amazing multipurpose hand cleaner. The new item is citrus scented and contains orange oil that is supposed to aid in leaving hands soft and clean without drying.

☐ **Multifunctional Detergents:** There's been a leveling off of sales of multifunctional detergents, according to a recent study of both brand name items and private labels by *Private Label* magazine. In the publication's annual study of the household cleaner market, it found declining sales for laundry detergents that offer fabric softeners and static controllers all in one.

Though this trend is leveling off, some manufacturers have yet to allow it to die completely. P&G is currently testing a version of Bold III laundry soap that offers a fabric softener. So is Lever with its Fab brand.

☐ **Dense Packs:** Some manufacturers have also turned to marketing "dense" packs of laundry soap. Instead of the usual 49 ounces, these denser and more concentrated cleaners are packaged in 42 ounce packs. For the retailer, dense packs mean more boxes per shelf.

☐ **Fabric Softeners:** Liquid fabric softeners are also on the outs, according to the *Private Label* study. More consumers are continuing to reach for the sheet rather than the bottle. This trend is more than likely due to the added convenience a sheet offers over the bottle, according to the study.

A recent entry by Lever — Snuggle liquid fabric softener — has, however, served to stir up the concentrated liquid fabric softener category. The product is reported to be doing well.

☐ **Dishwasher Detergent:** As the number of automatic dishwashers increases throughout the country, so have sales for dishwasher detergent. In 1978, only 42 percent of U.S. households had dishwashers, but that number has jumped to an estimated 59 percent.

To meet the growth, Colgate-Palmolive recently introduced Bright Side brand automatic dishwashing liquid. Bright Side is reportedly the first liquid dishwasher detergent to be put out by a major soap manufacturer. MM

Military Market index

COMMISSARIES

		NOVEMBER			YEAR TO DATE		
		CY'85	CY'84	% CHANGE	CY'85	CY'84	% CHANGE
	CONUS	$156,798	$152,731	2.66	$1,701,818	$1,657,250	2.69
	OVERSEAS	29,595	30,991	–4.50	292,750	328,964	–11.01
AIR FORCE*	TOTAL	**186,393**	**183,722**	**1.45**	**1,994,568**	**1,986,214**	**0.42**
	CONUS	108,990	108,045	0.87	1,174,110	1,164,135	0.86
	OVERSEAS	34,440	33,075	4.13	344,085	359,310	–4.24
ARMY	TOTAL	**143,430**	**141,120**	**1.64**	**1,518,195**	**1,523,445**	**–0.34**
	CONUS	62,410	59,043	5.70	684,969	662,358	3.41
	OVERSEAS	6,707	7,140	–6.06	75,959	78,914	–3.74
NAVY	TOTAL	**69,117**	**66,183**	**4.43**	**760,928**	**741,272**	**2.65**
	CONUS	14,764	13,838	6.69	155,304	145,677	6.61
	OVERSEAS	266	225	18.22	2,796	2,358	18.58
MARINE CORPS	TOTAL	**15,030**	**14,063**	**6.88**	**158,100**	**148,035**	**6.80**
	CONUS	263	297	–11.45	2,918	2,839	2.78
	OVERSEAS	353	278	26.98	3,280	3,039	7.93
COAST GUARD	TOTAL	**616**	**575**	**7.13**	**6,198**	**5,878**	**5.44**
	CONUS	$343,225	$333,954	2.78	$3,719,119	$3,632,259	2.39
ALL	OVERSEAS	$71,361	$71,709	–0.49	$718,870	$772,585	–6.95
COMMISSARIES	TOTAL	**$414,586**	**$405,663**	**2.20**	**$4,437,989**	**$4,404,844**	**0.75**
GROCERY STORES	U.S.[1]	$22.828	$21.343	6.96	$240.774	$230.203	4.59

* The Air Force data has been adjusted to reflect the transfer of Alaskan commissaries from the Pacific Region to the California Region because of AFCOMS reorganization, thus accounting for the large percentage change.

EXCHANGES

		NOVEMBER			YEAR TO DATE		
		CY'85	CY'84	% CHANGE	CY'85	CY'84	% CHANGE
	CONUS	$257,881	$232,237	11.04	$2,604,376	$2,521,964	3.27
	OVERSEAS	169,261	147,355	14.87	1,700,728	1,681,925	1.12
AAFES	TOTAL	**427,142**	**379,592**	**12.53**	**4,305,104**	**4,203,889**	**2.41**
	CONUS[2]	93,112	101,731	–8.47	961,166	973,987	–1.32
	OVERSEAS[2]	38,960	40,934	–4.82	401,584	405,555	–0.98
NAVY	TOTAL[2]	**132,072**	**142,665**	**–7.43**	**1,362,750**	**1,379,542**	**–1.22**
	CONUS	32,134	31,865	0.84	317,378	309,446	2.56
	OVERSEAS	5,231	4,722	10.78	53,700	52,564	2.16
MARINES	TOTAL	**37,365**	**36,587**	**2.13**	**371,078**	**362,010**	**2.50**
	CONUS[3]	7,038	6,935	1.49	73,074	68,282	7.02
	OVERSEAS[3]	506	946	–46.51	5,550	8,890	–37.57
COAST GUARD	TOTAL[3]	**7,544**	**7,881**	**–4.28**	**78,624**	**77,172**	**1.88**
	CONUS[4]	1,640	1,596	2 76	12,571	13,274	–5.30
	OVERSEAS[4]	4,365	5,780	–24.48	35,695	43,461	–17.87
MAIL ORDER	TOTAL[4]	**6,005**	**7,376**	**–18.59**	**48,266**	**56,735**	**–14.93**
	CONUS	$391,805	$374,364	4.66	$3,968,565	$3,886,953	2.10
	OVERSEAS	$218,323	$199,737	9.31	$2,197,257	$2,192,395	0.22
ALL EXCHANGES	TOTAL	**$610,128**	**$574,101**	**6.28**	**$6,165,822**	**$6,079,348**	**1.42**
DEPARTMENT STORES	U.S.[1]	$13.915	$13.533	2.82	$114.053	$108.936	4.70

1) SOURCE: U.S. Department of Commerce. 2) Does not include sales of ship stores. 3) MM estimate, based on official data. 4) Includes consolidated sales for all services, including Coast Guard. NOTE: Individual figures may not add to totals because of rounding. All sales are expressed in millions (add 000), except grocery stores and department stores, which are in billions. Commissary sales include appropriate surcharges; exchange sales include concession volume.